This Training Guide walks users through initiating and submitting amendments for the following scenarios:

- Scenario One: Change Quantity or Unit Cost
- Scenario Two: Add or Delete a Line Item (returns)
- Scenario Three: Amend Payment Terms
- Scenario Four: Add or Change Payment Info Tab
- Scenario Five: Make Changes to a Capital Asset Order
- Scenario Six: Accounting Changes
- Scenario Seven: Change Vendor Division/Address

> For any other scenarios or questions, contact Central Purchasing at purchasing@uci.edu or 949.824.4040 x3

Keep in mind:
- Anyone in the workflow or with Role 54 access can initiate an amendment. If needed, request access from Department Security Administer (DSA).
- Amendments can only be processed on Purchase Orders with an **Open Status**.
  - **Note:** UCIBuy generated orders can only amend accounting lines if there are no payments made against the Purchase Order.
- Amendments should only be processed for internal use only.
  - If the supplier requires proof of changes to the Purchase Order, the Contract Manager needs to process a Letter of Explanation (via email, fax or regular mail) to provide a clear account of any modifications made.
- Business Contract Amendments: See instructions located at Portal > Finances/KFS > Purchasing > Training and Resources > KFS Purchasing Training Guides > Requisition for Business Contracts/Agreements.

Steps to Initiate an Amendment

Step 1: Access Portal.
A. Go to **portal.uci.edu**, log on and select **Finances/KFS.**
B. Navigate to the **Purchasing** portlet.
C. Select the + button next to **Custom Document Search** and select **Purchase Orders**.
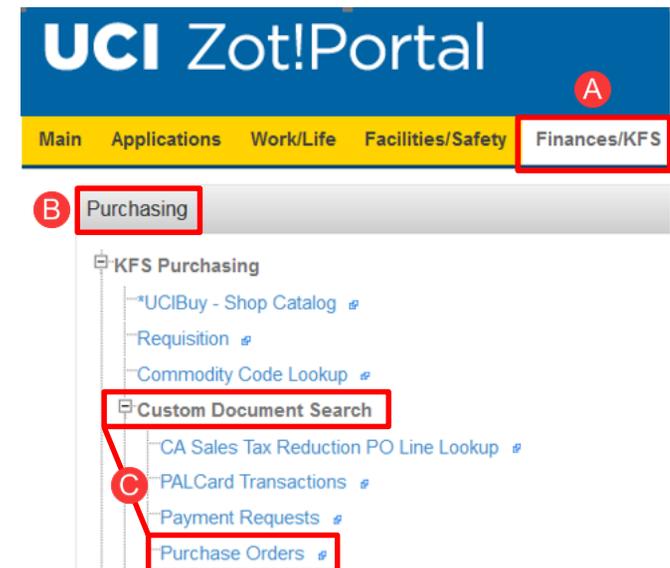
Step 2: Enter Search Criteria.
A. **Type** field defaults to **PO**.
B. If the current purchase order document number is known, type the number in **Document/Notification ID** field.
C. If the purchase order number is known, type the number in **Purchase Order #** field.

> Additional search instructions are located at
> Portal > Finances/KFS > Purchasing > Training and Resources > KFS Purchasing Training Guides > Purchase Order (PO) Fundamentals Training Guide > pages 10 – 11.

Document Lookup ❓ detailed search | superuser search | clear saved searches

Searches

* required field

Warnings for this Section:
- NOTE: Only Contract Managers are authorized to give purchase order numbers to vendors.

Ⓐ **Type:** PO ✕
Initiator:
Ⓑ **Document/Notification Id:**
Date Created From:
Date Created To:
Document Description:
Organization Document Number:
Purchase Order Type:
Ⓒ **Purchase Order #:**
Requisition #:

D. Select **Document/Notification Id** link that has **Open** listed under **Purchase Order Status Description** column to view Purchase Order.

2 items found. Please refine your search criteria to narrow down your search.
ⓘ 2 items found, displaying all items .

Document/Notification Id	Document Description	Organization Document Number	Purchase Order Type	Purchase Order #	Purchase Order Status Description	Type	PO End Date	Ledger Document Type	Total Amount	Route Log
1576773	C/A Baker Tilly Beers & Cutler PLLC		C	44571	Open	Purchase Order Amendment	01/30/2016	POA	75,000.00	🔍
1394329	C/A Baker Tilly Beers & Cutler PLLC		C	44571	Retired Version	Purchase Order		PO	75,000.00	🔍

Export options: 🗎 CSV | 📊 Excel | ⟨⟩ XML

Step 3: Select correct amend button.
A. **Amend** (used for non-UCIBuy orders)
B. **Amend accounting lines only** is used to only change accounting information.
   - This option can only be used if there are no payments against the line item and is also a non-Capital Asset related item. See **Scenario Six** for more details and instructions.

> When a POA is initiated, a new document is created. The PO number will always remain the same.

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(sensitive data) (close order) (amend) (amend accounting lines only) (send ad hoc request) (close)

Purchase Order Amendment ❓

Doc Nbr: 1576773	**Status:** FINAL
Initiator: 👤	**Created:** 09:29 AM 09/28/2015
Purchase Order #: 44571	**Purchase Order Status:** Open

Step 4: Provide Reason.

A. Provide detailed explanation of changes.
B. Select **yes** button.
C. This description appears in the **Notes and Attachments** field.

Are you sure you want to **Amend** this Purchase Order?

* Please enter the reason below:

Ⓐ

Ⓑ yes no

Notes and Attachments

	Posted Timestamp	Author	* Note Text
add:			Ⓒ
		NISWONGER, SHAUNA	Note entered while amending a Purchase Order :

Scenario Instructions

Complete steps outlined in applicable scenario and proceed to **Step 5**.

Scenario One: Change Quantity **or** Unit Cost.
A. Change Quantity for applicable **Item Line**.
- Enter new amount in the **Quantity** field (e.g. only 15 available, change from 20 to 15 EA).
B. Increase or reduce item amount (must be equal or greater than what has already been paid against the **Item Line**).
- Enter new amount in **Unit Cost** field (e.g. decrease **Unit Cost** from $21.45 to $20.45).

Change takes effect after the **save** button is selected at the bottom of the document.

Item Line #	Item Type	Quantity	UOM	Catalog #	* Commodity Code	Description	Unit Cost
Item 1							
1	Qty, taxable	Ⓐ 15	EA Each	1161-1700	41121800 General laboratory glassware and plasticware and supplies	Beaker, Glass, 400ml	21.45

Description	Unit Cost	Extended Cost	Tax Amount	Total Amount
200 ul TipOne RPT tip wafers	Ⓑ 20.45	204.50	16.36	220.86

Scenario Two: Add or Delete a Line Item.

A. To add an item (e.g. additional supplies needed to complete a repair), go to the **Add Item** tab and enter in **Item Line** information.
   - Another alternative is to complete a new requisition for the additional items.
B. Once complete, select the **add** button under the **Actions** column.
C. Select **show** in the **Accounting Lines** section and fill out applicable fields.
   - Once complete, select **add**.

D. To delete item (e.g. supplier confirmed item is no longer available and won't be received), select the **void line** button.
   - New order total is updated after **calculate** is selected.

Scenario Three: Amend Payment Terms of PO or Contract (only can be processed by a **Contract Manager**).
A. Go to **Vendor** tab and use the drop-down menu and select the correct **Payment Terms**.

Scenario Four: Add or Change **Payment Info** Tab.

A.   Select the **Recurring Payment** box.
B.   Enter the **Begin / End Date**.

The Payment Info tab is for internal use only and does not change the terms of the Purchase Order agreement.

Scenario Five: Capital Asset Change.
A. Correct the **Object Code**.
  • Object code is editable if there are no payments against the line.
    o Type new object code over existing.
B. Update the necessary changes in the **Capital Asset** fields (if needed) per guidelines.
  • Change from Equipment object code to another Equipment object code.
    o No change needed to the **Capital Asset** tab.
  • Change from Equipment object code to a Supply object code.
    o Select the **change** button to clear tab.
  • Change from Supply object code to Equipment code.
    o Fill out **Capital Asset** tab per Capital Asset Training Guide.

Capital Asset instructions are located at Portal > Finances/KFS > Purchasing > Training and Resources > KFS Purchasing Training Guides > Requisition for Capital Asset Training Guide >

Scenario Six: Accounting Changes.

Option One: **amend accounting lines only**.
Used for an accounting change on an **Item** with no payments against it (see the **Amount Paid** field in the **Current Items** section to verify first).

A. Select **amend accounting lines only** button**.**
  • This option can be used for UCIBuy orders with no payments against it and non-Capital Asset Purchase Orders.
B. Go to the accounting line to be changed and select the **show** button.
C. Type the correct account in the **Accounting Lines** field.

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| sensitive data | amend | amend accounting lines only | void order | send ad hoc request | close |

Item Line #	Item Type	Quantity	UOM	Catalog #	* Commodity Code	Description	Unit Cost	Extended Cost	Tax Amount	Total Amount	Assigned To Trade In	Actions	Amount Paid
Item 1													
1	Qty, taxable	3.00	EA Each	A3-CH-8035	56122000 Laboratory furniture	MRI stools	746.00	2,238.00	179.04	2,417.04	☐	inactivate	0.00
Ⓑ ▶show Accounting Lines													

Ⓒ

Accounting Lines ❓

Source

* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Percent
IR ▾ UC IRVINE			8040 EQUIPMENT $200 - $4999		Research Activities		

- -

Option Two: Accounting change on an **Item** with partial payments made against it.
Reminder: Cannot be used for UCIBuy orders.
A. Select the **amend** button.
B. Reduce the existing Item to the amount paid (e.g. $172.97 + tax = $188.01).
C. Select the **clear all tax** button above the **Current Items** section to ensure that tax calculates correctly.
D. Create a new Line Item for the difference with the correct Account information.

A General Error Correction (GEC) must be completed to correct any payments that have already been processed (e.g. **Item 1** processed payment of $188.01).

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| sensitive data | amend | amend accounting lines only | void order | send ad hoc request | close |

Current Items

Item Line #	Item Type	Quantity	UOM	Catalog #	* Commodity Code	Description	Unit Cost	Extended Cost	Tax Amount	Total Amount	Assigned To Trade In	Actions	Amount Paid
Item 1													
1 ↑↓	No Qty, taxable ▾				78181500 Vehicle maintenance and repair services	DESCRIPTION: BASEBALL FIELD	172.97	172.97	15.04	188.01	☐		188.01
▶show Accounting Lines													
Item 2													
2 ↑↓	No Qty, taxable ▾				78181500 Vehicle maintenance and repair services	BASEBALL FIELD MAINTENANCE	9,086.29	9,086.29	725.70	9,811.99	☐	delete	
▶show Accounting Lines													

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Ⓒ

| setup distribution | remove accounts from all items | remove commodity codes from all items | expand all accounts | collapse all accounts | clear all tax |

Add Item ❓   import lines

Ⓓ

Item Line #	* Item Type	Quantity	UOM:	Catalog #	* Commodity Code	* Description	* Unit Cost	Extended Cost	Tax Amount	Total Amount	Assigned To Trade In	Action
	Qty, taxable ▾							0.00			☐	add

Scenario Seven: Change Vendor Division/Address (can only be done on an order with no payments against it and can only be processed by a Contract Manager).

A. Go to the **Vendor** tab and select 🔍 icon to search for possible divisions.
B. Select **search** (**Vendor #** already pre-populated in field).
C. Select **return value** to return the selection to the document if applicable.

Changes can only be made within the same Vendor Family (E.g. 5023-0 to 5023-1, etc.).

A

Vendor	▼ hide
Vendor Address	
Vendor:	ORANGE COUNTY TAX COLLECTOR 🔍
Vendor #:	5023-0
Remit Name:	
Address 1:	PO BOX 1438 🔍
Address 2:	
Attention:	

B

Vendor Lookup ❓

Vendor Name:	
Tax Number:	
Vendor #:	5023
DUNS Number:	
Active Indicator:	● Yes ○ No ○ Both
Vendor Type:	PURCHASE ORDER ▼ 🔍
Ownership Type:	▼
Ownership Type Category:	▼
Is this a foreign vendor:	○ Yes ○ No ● Both
Vendor Presence in California:	○ Yes ○ No ● Both
Insurance Certification on File:	○ Yes ○ No ● Both
State:	
Commodity Code:	🔍
Supplier Diversity:	▼ 🔍
Vendor Approved Date From:	📅
Vendor Approved Date To:	📅
Initial AMS Feed Date From:	📅
Initial AMS Feed Date To:	📅
Last AMS Update Date From:	📅
Last AMS Update Date To:	📅
Subject 1099 Indicator:	○ Yes ○ No ● Both

(search) (clear) (cancel)

Return Value	Vendor Name	TIN Name	Remit Name	Subject 1099 Indicator	Search Alias	Vendor #
return value	ORANGE COUNTY TAX COLLECTOR	ORANGE COUNTY TAX COLLECTOR		No	KVO-6058 MCVND-0700001	5023-0
C return value	ORANGE COUNTY TAX COLLECTOR > ORANGE COUNTY HEALTH CARE	ORANGE COUNTY TAX COLLECTOR		No	MCVND-0001000	5023-1

Step 5

Save, calculate and submit the Amendment

A. Scroll down and select **save.**
B. Scroll down and select **calculate** to update the **Items** tab with tax and order totals.
C. Scroll down and select **submit**.
   • Amendment routes to the Fiscal Officer for approval.
   • Once approved, it routes to the Contract Manager on the Purchase Order.

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| calculate | sensitive data | submit | save | reload | close | cancel |